



**Solicitation Information
April 12, 2016**

RFP #7550512

TITLE: Commissioning Services – Rhode Island Dept. of Education – MPA-462

Submission Deadline: Wednesday, May 11, 2016 at 2:00 PM (ET)

Questions concerning this solicitation must be received by the Division of Purchases at gail.walsh@purchasing.ri.gov no later than **Monday, April 25, 2016 at 5:00 PM (ET)**. Questions should be submitted in a *Microsoft Word attachment*. Please reference the RFP# on all correspondence. Questions received, if any, will be posted on the Internet as an addendum to this solicitation. It is the responsibility of all interested parties to download this information.

SURETY REQUIRED: No

BOND REQUIRED: No

GAIL WALSH
CHIEF BUYER

Applicants must register on-line at the State Purchasing Website at www.purchasing.ri.gov

Note to Applicants:

Offers received without the entire completed four-page RIVIP Generated Bidder Certification Form attached may result in disqualification.

THIS PAGE IS NOT A BIDDER CERTIFICATION FORM

Request for Proposals **Commissioning SERVICES**

The Rhode Island Department of Administration, Division of Purchases, on behalf of the Rhode Island Department of Education (RIDE), is requesting proposals and statements of qualifications from interested individuals and organizations to provide Commissioning Services to RIDE on an as-needed basis by entering into a Master Price Agreement (MPA) with the State of Rhode Island, in accordance with the terms of this solicitation and the General Conditions of Purchase (available at www.purchasing.ri.gov).

It is the intention of the State to compile a list of vendors qualified to provide these services.

This is a Request for Proposals, not an Invitation for Bid. Responses will be evaluated on the basis of the relative merits of the proposal, in addition to price; there will be no public opening and reading of responses received by the Division of Purchases pursuant to this Request, other than to name those offerors who have submitted proposals.

INSTRUCTIONS AND NOTIFICATIONS TO OFFERORS

Potential offerors are advised to review all sections of this solicitation carefully and to follow instructions completely, as failure to make a complete submission as described elsewhere herein may result in rejection of the proposal.

Alternative approaches and/or methodologies to accomplish the desired or intended results of this procurement are solicited. However, proposals which depart from or materially alter the terms, requirements, or scope of work defined by this Request will be rejected as being non-responsive.

All costs associated with developing or submitting a proposal in response to this Request, or to provide oral or written clarification of its content, shall be borne by the offeror. The State assumes no responsibility for these costs.

Proposals are considered to be irrevocable for a period of not less than sixty (60) days following the opening date, and may not be withdrawn, except with the express written permission of the State Purchasing Agent.

All pricing submitted will be considered to be firm and fixed unless otherwise indicated herein.

Proposals misdirected to other State locations or which are otherwise not present in the Division of Purchases at the time of opening for any cause will be determined to be late and may not be considered. PROPOSALS EMAILED OR FAXED TO THE DIVISION OF PURCHASES WILL NOT BE CONSIDERED. The "Official" time clock is in the reception area of the Division of Purchases.

It is intended that an award pursuant to this Request for Proposals will be made to prime contractor(s) who will assume responsibility for all aspects of the work. Joint ventures shall be considered, so long as the contractor's duties and responsibilities are clearly articulated in such form as acceptable to the State. Subcontractors are permitted, provided their use is clearly indicated in the offeror's proposal and the subcontractor(s) to be used are identified in the proposal.

All proposals should include the vendor's FEIN or Social Security number as evidenced by a W9, downloadable from the Division's website at www.purchasing.ri.gov.

The purchase of services under an award made pursuant to this RFP will be contingent on the availability of funds.

In accordance with Title 7, Chapter 1.2 of the General Laws of Rhode Island, no foreign corporation shall have the right to transact business in the state until it shall have procured a Certificate of Authority to do so from the Rhode Island Secretary of State (401-222-3040). *This will be a requirement only of the successful bidder (s).*

Offerors are advised that all materials submitted to the State of Rhode Island for consideration in response to this Request for Proposals will be considered to be public records, as defined in Title 38 Chapter 2 of the Rhode Island General Laws, without exception, and will be released for inspection immediately upon request, once an award has been made.

Also, Submitters should be aware of the State's MBE requirements, which addresses the State's goal of ten per cent (10%) participation by MBE's in all State procurements. For further information, contact the State MBE Administrator at (401) 574-8670 or Dorinda.keene@doa.ri.gov. Visit the website <http://www.mbe.ri.gov>.

Interested parties are instructed to peruse the Division of Purchases web site on a regular basis, as additional information relating to this solicitation may be released in the form of an addendum to this RFP.

Equal Employment Opportunity (RIGL 28-5.1)

§ 28-5.1-1 Declaration of policy. – (a) Equal opportunity and affirmative action toward its achievement is the policy of all units of Rhode Island state government, including all public and quasi-public agencies, commissions, boards and authorities, and in the classified, unclassified, and non-classified services of state employment. This policy applies in all areas where the state dollar is spent, in employment, public service, grants and financial assistance, and in state licensing and regulation. For further information, contact the Rhode Island Equal Employment Opportunity Office, at 222-3090 or via email raymond.lambert@doa.ri.gov.

RIGL 37-13-3.1 State public works contract apprenticeship requirements. * (a) Notwithstanding any laws to the contrary, all general contractors and subcontractors who perform work on any public works contract awarded by the state after passage of this act and valued at one million dollars (\$1,000,000) or more shall employ apprentices required for the performance of the awarded contract. The number of apprentices shall comply with the apprentice to journeyman ratio for each trade approved by the apprenticeship council of the department of labor and training.

ARCHITECTURAL / ENGINEERING SERVICES

Persons or firms practicing Architectural and/or Engineering Services in the State of Rhode Island must possess a proper registration and Certificate of Authorization in accordance with Rhode Island General laws.

A copy of the current Rhode Island Certificate of Authorization for the firm and current Rhode Island registration(s) for the individual(s) who would perform the work must be included behind the front page of each copy of the Proposal.

The Board for Design Professionals can be contacted as follows:

Board for Design Professionals
1511 Pontiac Avenue (Bldg 68-2)
Cranston, RI 02920
Tel: 401-462-9530
Fax: 401-462-9532
www.bdp.state.ri.us

BACKGROUND/OVERVIEW

The Rhode Island Department of Education (RIDE) School Construction Regulations require that all school construction projects procure the services of an independent engineering Commissioning Agent. Commissioning is the process of ensuring that systems are designed, installed, functionally tested, and capable of being operated and maintained to perform in conformity with the design intent of a project. The Commissioning Agent must be secured prior to the design phase of the project. The Commissioning Agent must be independent, and be procured separately from the construction contract. The Commissioning Agent will be responsible for enforcement of the regulations for the project during the design, construction, and operational acceptance process. During schematic design and design development, the Commissioning Agent will verify that all standards have been met through meetings with the design team and review of plans submitted by the design team. The Commissioning Agent will continue to monitor compliance with these regulations through the development of construction documents and through the construction process to ensure that all building systems, mechanical and lighting equipment, and specifications are in compliance with regulations, included in and consistent with all plans, construction documents, and cost estimates.

This Request for Proposals is to solicit responses that are aligned with the School Construction Regulations so that services may be obtained in a timely fashion for specific projects of work. No estimate or commitment to a specific level of spending or to a specific project is made by this request; however, all projects authorized under the MPA that result from this request will be supported by a written agreement that details the scope of work, tasks, deliverables, project schedule and budget. Vendors selected under this solicitation will be placed on the qualified vendor list for **MPA #462** and will be subject to the state's General Conditions of Purchase (available at www.purchasing.ri.gov), the terms of this request, and any specific terms and conditions set forth in **MPA #462**.

SCOPE OF THE WORK

The Commissioning Agent must:

- Bring the owner's needs and project requirements to the forefront at each phase of the project to ensure that the finished project will meet expectations;
- Improve the building's overall performance by optimizing energy-efficient design features and directly addressing issues like equipment performance testing and system integration; and
- Verify that building staff members are well-trained and possess the documentation they need to operate and maintain the building's systems and equipment after turnover.

In general, applicants must have excellent written and oral communications skills; the ability to interact effectively with a wide variety of constituencies; and American Society of Heating, Refrigeration, and Air Conditioning Engineers (ASHRAE) standards and Northeast Collaborative for High Performance Schools (NECHPS) protocol knowledge. Respondents must also be able to cope with a high degree of variety of work, manage complex and demanding activities, meet agreed-upon timelines, and work independently.

Appendix A contains budget detail sheets.

Appendix B contains a sample scope of work for a Commissioning Agent.

TERMS OF THE AGREEMENT

The Master Price Agreement will begin upon issuance of a state purchase order (on or about **July 1, 2016**) and end **June 30, 2021**. The State retains the option of granting a time extension of up to **12 months**.

COST PROPOSAL

Offerers are to price their services for the term of the MPA. Cost proposals should specify pricing for year 1, year 2, year 3, year 4 and the option year 5. If only one set of prices are offered, that pricing will remain constant through the term of this MPA.

The cost proposal for each year must be prepared using the budget detail sheets found in Appendix A. These forms require the bidder to indicate the hourly rates for salary and fringe by name (if available) and position title for all personnel that may work on a project. The form provides space for the cost of consultants that the bidder may hire and for other expenses that the bidder may charge. Actual names are not required, and position titles for staff and consultants whose names are to be determined (TBD) may be indicated.

Costs, as evidenced by hourly rates or per diem fees, are a weighted factor in the bid evaluation process and may have a considerable impact on which vendors are selected for use under the MPA.

Placement of a vendor on the MPA **does not** guarantee income. Vendors will be contacted on an as needed basis, and all actual costs for each project will be negotiated upon award of a specific project to a specific vendor under this MPA. If selected for a specific project, vendors will have an opportunity to review project specifications to determine the appropriate number of hours for the job. The maximum hourly rate(s) will be the rate(s) included with the cost proposal.

Questions concerning this solicitation may be e-mailed to the Division of Purchases at the address on the cover sheet of this solicitation and no later than the date & time listed. **Send your questions in Microsoft Word format.** Please reference the RFP# on all correspondence. Questions received, if any, will be posted and answered on the Internet as an addendum to this solicitation. It is the responsibility of all interested parties to download this information. For computer technical assistance, call the help desk at (401) 222-3766 or Lynda.moore@doit.ri.gov.

1. A completed and signed three-page RIVIP Bidder Certification Cover Form, available at www.purchasing.ri.gov.
2. A ***separate sealed*** Cost Proposal as described above.
3. A *separate* Technical Proposal (see below) describing the qualifications and background of the applicant and experience with similar programs, as well as the work plan or approach proposed for this requirement.
4. A completed and signed W-9 (taxpayer identification number and certification). Form is downloadable at www.purchasing.ri.gov.
5. In addition to the multiple hard copies of proposals required, Respondents are requested to provide their proposal in electronic format (CD-Rom or flash drive). Microsoft Word / Excel or PDF format is preferable. Only 1 electronic copy is requested. This CD / flash drive should be included in the proposal marked "original."

Contractor assumes all responsibilities for proposals submitted by mail or commercial delivery service. Proposals misdirected to other state locations or which are otherwise not present in the Office of Purchases at the time of opening, for any cause, will be determined to be late and will not be considered. Faxed responses will not be considered.

TECHNICAL PROPOSAL REQUIRED ELEMENTS / EVALUATION CRITERIA

Responses will be evaluated using the following criteria:

1. Relevant Experience (as evidenced by prior experience with commissioning services) **(30 points)**
2. Qualifications of Available Staff (as evidenced by resumes of staff who may be provided to perform commissioning services) **(20 points)**
3. Capacity (as evidenced by the vendor's ability to supply qualified staff upon short notice) **(20 points)**
4. Cost (as evidenced by hourly rate) **(30 points)**

Offerors must receive a minimum of 70 technical points, out of a possible 100, to gain status as an approved service provider on MPA # 462. Placement on the Master Price Agreement approved service provider list is no guarantee of income. The State reserves the right to negotiate pricing.

NOTWITHSTANDING THE ABOVE, THE STATE RESERVES THE RIGHT TO AWARD ON THE BASIS OF COST ALONE, TO ACCEPT OR REJECT ANY OR ALL OPTIONS, BID PROPOSALS, AND TO ACT IN ITS BEST INTEREST.

PROPOSALS FOUND TO BE TECHNICALLY OR SUBSTANTIALLY NON-RESPONSIVE AT ANY POINT IN THE EVALUATION PROCESS WILL BE REJECTED AND NOT CONSIDERED FURTHER.

THE STATE MAY, AT ITS SOLE OPTION, ELECT TO REQUIRE REPRESENTATION (S) BY OFFERORS CLEARLY IN CONSIDERATION FOR AWARD.

APPENDIX A

Budget Detail Sheets

**BUDGET DETAIL SHEET
FISCAL YEAR 2017**

SALARY DETAIL

NAME	POSITION TITLE	HOURLY RATE \$
TOTAL REQUEST		

FRINGE BENEFIT DETAIL (If not included in hourly rate)

NAME	POSITION TITLE	PERCENTAGE of APPLIED FRINGE BENEFIT
TOTAL REQUEST		

DETAIL OF CONSULTANT

NAME	POSITION TITLE	HOURLY RATE \$
TOTAL REQUEST		

EXPLANATION OF OTHER EXPENSES (i.e. travel, printing, office supplies, educational materials, and equipment)

EXPENSE CATEGORY	DESCRIPTION	COST

**BUDGET DETAIL SHEET
FISCAL YEAR 2018**

SALARY DETAIL

NAME	POSITION TITLE	HOURLY RATE \$
TOTAL REQUEST		

FRINGE BENEFIT DETAIL (If not included in hourly rate)

NAME	POSITION TITLE	PERCENTAGE of APPLIED FRINGE BENEFIT
TOTAL REQUEST		

DETAIL OF CONSULTANT

NAME	POSITION TITLE	HOURLY RATE \$
TOTAL REQUEST		

EXPLANATION OF OTHER EXPENSES (i.e. travel, printing, office supplies, educational materials, and equipment)

EXPENSE CATEGORY	DESCRIPTION	COST

**BUDGET DETAIL SHEET
FISCAL YEAR 2019**

SALARY DETAIL

NAME	POSITION TITLE	HOURLY RATE \$
TOTAL REQUEST		

FRINGE BENEFIT DETAIL (If not included in hourly rate)

NAME	POSITION TITLE	PERCENTAGE of APPLIED FRINGE BENEFIT
TOTAL REQUEST		

DETAIL OF CONSULTANT

NAME	POSITION TITLE	HOURLY RATE \$
TOTAL REQUEST		

EXPLANATION OF OTHER EXPENSES (i.e. travel, printing, office supplies, educational materials, and equipment)

EXPENSE CATEGORY	DESCRIPTION	COST

**BUDGET DETAIL SHEET
FISCAL YEAR 2020**

SALARY DETAIL

NAME	POSITION TITLE	HOURLY RATE \$
TOTAL REQUEST		

FRINGE BENEFIT DETAIL (If not included in hourly rate)

NAME	POSITION TITLE	PERCENTAGE of APPLIED FRINGE BENEFIT
TOTAL REQUEST		

DETAIL OF CONSULTANT

NAME	POSITION TITLE	HOURLY RATE \$
TOTAL REQUEST		

EXPLANATION OF OTHER EXPENSES (i.e. travel, printing, office supplies, educational materials, and equipment)

EXPENSE CATEGORY	DESCRIPTION	COST

BUDGET DETAIL SHEET
FISCAL YEAR 2021 (OPTIONAL EXTENSION YEAR)

SALARY DETAIL

NAME	POSITION TITLE	HOURLY RATE \$
TOTAL REQUEST		

FRINGE BENEFIT DETAIL (If not included in hourly rate)

NAME	POSITION TITLE	PERCENTAGE of APPLIED FRINGE BENEFIT
TOTAL REQUEST		

DETAIL OF CONSULTANT

NAME	POSITION TITLE	HOURLY RATE \$
TOTAL REQUEST		

EXPLANATION OF OTHER EXPENSES (i.e. travel, printing, office supplies, educational materials, and equipment)

EXPENSE CATEGORY	DESCRIPTION	COST

APPENDIX B

Sample Commissioning Scope of Work Rhode Island Department of Education (RIDE)

Commissioning activities are structured to follow the most current applicable ASHRAE standard and the NECHPS protocol's commissioning guidelines, provide quality basic commissioning services, and meet reasonable budget limitations. To meet these commissioning goals we have provided a sample commissioning procedures. Not all procedures are applicable to all projects and Commissioning Services are not limited to this list:

- Review construction documents.
- Develop and utilize a commissioning plan.
- Review contractor submittals for systems being commissioned.
- Verify installation, functional performance, training, and operation and maintenance documentation for systems being commissioned.
- Complete a commissioning report.
- Provide the owner with a systems manual that helps the owner operate the building systems as efficiently and effectively as possible and contains the information required for re-commissioning of building systems.
- Review building operation with Operation and Maintenance (O&M) staff and provide a plan for resolution of outstanding commissioning-related issues within one year after construction completion date.

1. During Design (Pre-Construction) Phase (If applicable):

- 1.1. Review the Design Intent document. The design intent document will serve as basis for commissioning activities
- 1.2. Conduct focused review of design prior to construction document phase
- 1.3. Conduct focused review of construction documents
- 1.4. Ensure that commissioning requirements are included in the documents
- 1.5. Create commissioning plan. The plan will include the following components:
 - Brief overview of commissioning process
 - List of all commissioned features and systems
 - Identification of primary commissioning participants and their responsibilities
 - Description of the management, communication, and reporting in the commissioning process
 - Outline of the commissioning process scope including submittal review, observation, startup, testing, training, O&M documentation and warranty period activities.
 - List of expected written deliverables.
 - Schedule of activities
 - A description of rigor and scope of testing
- 1.6. Draft commissioning specifications

2. During Construction Phase (If applicable):

- 2.1. Attend construction meetings – As necessary to accomplish the stated goal.
- 2.2. Review selected Mechanical and Electrical submittals (related to systems that will be commissioned).
- 2.3. Create functional test procedures for the following systems (as applicable)
 - Air handling units
 - Condensing units
 - Unit heaters
 - Radiant system
- 2.4. Review control system programs with the Controls Contractor
- 2.5. Witness major equipment start up (air handlers). Review of pre-functional test procedures, start-up procedures and contractor's checklists for equipment to be commissioned.
- 2.6. Direct contractors to demonstrate functional tests of the following systems (as applicable):
 - Air handling units
 - Condensing units
 - Unit heaters
 - Radiant system
- 2.7. Review and comment on the O&M manuals
- 2.8. Review and comment on the Training Plan
- 2.9. Prepare a commissioning report; the report will include the following:
 - Commissioning plan
 - Functional test procedures
 - Results of functional test procedures
 - Recommendations for improvements
 - Trend graphs
 - All commissioning related correspondence
 - Blank test forms for re-commissioning in the future
 - Verification of installation, training, operations and maintenance documentation for each commissioned system
- 2.10. Develop a Systems and Energy Manual for commissioned systems in compliance with the NECHPS protocol. The manual will include the following components compiled, as available, from various construction documents and project deliverables:
 - Index of all commissioning documents with notation as to their storage location.
 - Commissioning Report
 - Initial and final design intent documents.
 - As-built documents.
 - Description of systems, including capabilities and limitations.
 - Ongoing operation instructions for energy-saving features and strategies
 - Functional performance tests results (benchmarks), blank test forms, and recommended schedule for on-going benchmarking.
 - Seasonal operational guidelines
 - Recommendation for recalibration frequency of sensors and actuators by type and use
 - Sequence of operations as actually implemented, with control system data including all setpoints, calibration data, etc.
 - Location of all control sensors and test ports.

- Seasonal start-up and shutdown procedures.
- Control schematics and computer graphics.
- Manufacturer's recommended maintenance procedures.

3. During Warranty (Post-Occupancy) Phase (If applicable):

3.1. Perform remaining seasonal commissioning tasks

3.2. Meet with the facility staff previous to the end of the warranty period and review building operation in the first year. Solicit O&M staff comments, suggestions and areas of concern regarding systems. Warranty items should be identified and a plan for resolution developed.

3.3. A detailed list of commissioning deliverables and schedules will be prepared and agreed upon as part of the Commissioning Plan development. Additional deliverables, if required will be discussed and mutually agreed upon before we start proceeding with their preparation. In general, the deliverable will consist of the following items:

- Review of design intent
- Review of Construction Documents
- Commissioning Plan
- Review of O&M Manuals and of the Training Plan
- Progress reports issued after each site visit.
- Review of Control System Programs
- Functional Test Procedures with results
- Systems Manual
- Final commissioning report issued at completion of the project.